



UGMA/UTMA Custodian Removal Form

Use this form to remove the custodian from a UGMA/UTMA account held at Pear Tree Funds once the minor has reached their state's age of trust termination.

Return this form and the Individual or Joint Account Application (must be completed by the former minor) to the address on page 2 of this form.

If you have a question about this form, call us at (800) 326-2151. For complete information about Pear Tree Funds and services, see the prospectus, which is available at www.peartreefunds.com or by calling the above toll-free number. If the former minor's name has changed, the former minor must also complete the Name Change Authorization Form and submit it together with this form and the Account Application.

1 ACCOUNT REGISTRATION

Please tell us how the account is currently registered:

Former Minor's Name *first, middle, last*

Social Security #

Birth Date *mm/dd/yyyy*

Daytime Phone *(with area code) in case we have questions*

Custodian's Name *first, middle, last*

Social Security #

Birth Date *mm/dd/yyyy*

Daytime Phone *(with area code) in case we have questions*

Account Number

Account Number

2 CERTIFICATIONS AND SIGNATURES

Either the custodian or the former minor may sign this form as long as their signature is notarized in SECTION 3.

By signing below, I (either Former Minor or Custodian) certify under penalties of perjury that:

- a) The information provided on this form is true, correct, and complete.
- b) The Former Minor listed in **SECTION 1** has attained the legal age required by the laws of the state under which the assets were gifted or transferred to him/her.
- c) No designation was made that requires termination of custodianship for the assets to be delayed until the Former Minor listed in **SECTION 1** reaches a later age.
- d) The Former Minor has not already received equivalent gifts or transfers of money from the custodian that would reduce the value of assets due to the beneficial owner of the account(s).
- e) There are no competing claims from the custodian or a successor custodian that would prevent the Former Minor from receiving assets in the account(s).

2 CERTIFICATIONS AND SIGNATURES (continued from page 1)

CUSTODIAN

Signature of Adult Custodian for UGMA/UTMA Account

Date mm/dd/yyyy

Print Name

OR

FORMER MINOR

Signature of Former Minor

Date mm/dd/yyyy

Print Name

3 NOTARY ACKNOWLEDGEMENT

The signature of the custodian or Former Minor in SECTION 1 of this form must be notarized below.

State of _____

County of _____

On this _____ day of _____, 20____, before me personally appeared

_____, to me personally known to be the individual described herein and who executed the foregoing instrument, and acknowledged that he executed the same.

Notary Public

My commission expires: _____

Notary: Affix stamp here



Mailing Address:*

Pear Tree Funds
Attention: Transfer Agent
55 Old Bedford Road, Suite 202
Lincoln, MA 01773

*For both standard and overnight Shipping



Phone Number:

(800)-326-2151



Website:

www.peartreefunds.com